

CRED

Columbia Research Enhanced Real Estate ETF Analyst Report

CRED tracks an index comprised of US REITs. The strategy is based on a multi-factor criteria evaluated by Columbia Threadneedle and Lionstone Investments.

ESG Themes and Scores

6.19/10

ESG Rate

40.46%

Global Percentile

76.11%

Peer Percentile

Performance Data

	CRED	ETF Database Category Average	Factset Segment Average
1 Month	3.09%	2.50%	2.61%
3 Month	17.18%	15.29%	15.06%
YTD Return	12.17%	11.20%	11.45%
1 Year Return	35.10%	29.69%	25.86%
3 Year Return	N/A	0.62%	1.23%
5 Year Return	N/A	1.97%	1.82%

Top 5 Holdings

Symbol	Holding	% Assets
AMT	American Tower Corporation	11.60%
SPG	Simon Property Group, Inc.	7.34%
CCI	Crown Castle Inc.	7.24%
EQIX	Equinix, Inc.	6.77%
O	Realty Income Corporation	6.05%

Vitals

Issuer	Ameriprise Financial
Brand	Columbia
Structure	ETF
Expense Ratio	0.33%
Inception	Apr 26, 2023
Index Tracked	Beta Advantage Lionstone Research Enhanced REIT Index - Benchmark TR Gross

ETF Database Themes

Category	Real Estate
Asset Class	Real Estate
Asset Class Size	Mid-Cap
Asset Class Style	Blend
Region (General)	North America
Region (Specific)	U.S.

FactSet Classifications

Segment	Equity: U.S. REITs
Category	Sector
Focus	Real Estate
Niche	REITs
Strategy	Multi-factor
Weighting Scheme	Multi-Factor

